

IN THE CLAIMS:

1. (currently amended) A document assembly production system comprising:

a server having a plurality of templates and other document assembly assets including a plurality of input documents stored therein, each template including logic imbedded within the template for controlling a structure of an assembled document, for controlling displaying document structure questions, and for identifying input documents used for performing document assembly; and

at least one remote computer configured to communicate with said server directing said server to access said plurality of templates and said other assembly assets to assemble fully formatted documents without using any document-assembly software and word processing software stored on said at least one remote computer, said ~~server~~ at least one remote computer configured to:

prompt a user ~~through the at least one remote computer~~ to select a template from the plurality of templates, each template is associated with a class of document to be assembled for a type of transaction, wherein each document class includes a plurality of document types, each document type represents specific contractual provisions typically associated with completing the corresponding transaction type, ~~each template includes logic for controlling a structure of the assembled document wherein the logic controls displaying document structure questions and identifying input documents used for performing the document assembly;~~

display document structure questions ~~on the remote computer~~, wherein the document structure questions displayed are controlled by the logic and conditions imbedded in the selected template and are displayed in a tree format without further communication with said server, the document structure questions identifying a predetermined plurality of contractual provisions that the user can select from for inclusion within the assembled document, the document structure questions linked to specific document types representing the predetermined plurality of contractual provisions, wherein by responding to the document structure questions the user includes the selected contractual provisions within the assembled document to complete the transaction type;

receive a response for each document structure question displayed, wherein the document structure responses and the logic imbedded within the selected template determine the document types included within the assembled document;

identify pre-assigned, modifiable input documents from the plurality of input documents compatible with the selected template and the document structure responses for generating the documents to be assembled, the identified input documents including data fill-points;

display transaction questions ~~on the remote computer~~, wherein the transaction questions displayed are controlled by logic and conditions imbedded in the selected template and the document structure responses;

receive a response for each transaction question displayed, wherein the transaction responses populate the data fill-points included within the identified input documents~~[[;]], the transaction responses checked for validity using the logic imbedded within the selected template and without further communication with said server; and~~

~~generate the assembled document based on~~ transmit data identifying the identified input documents and the transaction responses received to said server for generating the assembled document; and

~~prompt the user to enter a workflow status representing a level of completion of the transaction type for which the documents are being assembled.~~

2. (original) A document assembly system in accordance with Claim 1 further comprising at least one database coupled to said server, each template stored in said database.

3. (original) A document assembly system in accordance with Claim 2 wherein said database comprises at least one security system that limits access to said database to authorized users.

4. (original) A document assembly system in accordance with Claim 1 wherein said at least one remote computer is further configured to communicate with said server to restructure and reassemble a previously assembled document.

5. (original) A document assembly system in accordance with Claim 1 wherein said at least one remote computer is further configured to communicate with said server to restructure and reassemble previously assembled documents by performing at least one of changing parameters within the previously assembled document, and adding new data to the previously assembled document while reusing organizational elements and document specific data common to the previously assembled document.

6. (original) A document assembly system in accordance with Claim 1 wherein said at least one remote computer is further configured to communicate with said server to assemble documents from an invoked template and said other assembly assets to assure compliance with state and federal laws, rules, and regulations, and business entity rules, regulations, and policies.

7. (original) A document assembly system in accordance with Claim 1 wherein said at least one remote computer is further configured to communicate with said server to integrate pre-approved documents from another computer system into said assembled document as said documents are being assembled.

8. (previously presented) A document assembly system in accordance with Claim 1 wherein said at least one remote computer is further configured to communicate with said server to display at least one of a user identity who created said document assembly and the workflow status of said document assembly.

9. (original) A document assembly system in accordance with Claim 1 wherein said at least one remote computer is further configured to communicate with said server to display a report including at least one of a summary of all document assembly elements, a summary of missing and incomplete parameters, and a summary of missing and corrupted document assembly elements.

10. (original) A document assembly system in accordance with Claim 9 wherein said at least one remote computer is further configured to communicate with said server to displayed the report prior to finalizing the assembly of the fully-formatted documents.

11. (original) A document assembly system in accordance with Claim 1 wherein said at least one remote computer is further configured to communicate with said server to provide secure access to said server such that only authorized users can access said document

assembly data, reports generated by said system relating to said assembled documents, data links provided within said system, and data stored in at least one database coupled to said server.

12.-19. (cancelled)

20. (currently amended) A document assembly production system comprising:

a server;

a database coupled to said server for storing a plurality of templates and other document assembly assets including a plurality of input documents, each template including logic imbedded within the template for controlling a structure of an assembled document, for controlling displaying document structure questions, and for identifying input documents used for performing document assembly; and

at least one remote computer in communication with said server, said server in communication with a processor module, said ~~server~~ at least one remote computer configured to communicate with said server directing said server to access said plurality of templates and said other assembly assets to assemble fully formatted documents without using any document-assembly software and word processing software stored on said at least one remote computer, said at least one remote computer further configured to:

~~prompt a user through said at least one remote computer to select a template from the plurality of templates, each template is associated with a class of document to be assembled for a type of transaction, wherein each document class includes a plurality of document types, each document type represents specific contractual provisions typically associated with completing the corresponding transaction type; each template includes logic for controlling a structure of the assembled document including logic for controlling displaying document structure questions and identifying input documents used for performing the document assembly;~~

display document structure questions ~~on said remote computer~~, wherein the document structure questions displayed are controlled by the logic and conditions imbedded in the selected template and are displayed in a tree format without further communication with said server, the document structure questions linked to specific

document types representing predetermined contractual provisions, wherein by responding to the document structure questions the user includes predetermined contractual provisions within the assembled document;

receive a response for each document structure question displayed, wherein the document structure responses and the logic imbedded within the selected template determine the document types included within the assembled document;

identify pre-assigned, modifiable input documents from the plurality of input documents compatible with the selected template and the document structure responses for generating the documents to be assembled, the identified input documents including data fill-points;

display transaction questions ~~on the remote computer~~, wherein the transaction questions displayed are controlled by logic and conditions imbedded in the selected template and the document structure responses;

receive a response for each transaction question displayed, wherein the transaction responses populate the data fill-points included within the identified input documents~~[[:]],~~ the transaction responses checked for validity using the logic imbedded within the selected template and without further communication with said server; and

~~generate the assembled document based on~~ transmit data identifying the identified input documents and the transaction responses received to said server for generating the assembled document; ~~and~~

~~prompt the user to enter a workflow status representing a level of completion of the transaction type for which the documents are being assembled.~~

21. (original) A document assembly system in accordance with Claim 20 further comprising at least one database coupled to said server, each incomplete assembled document stored in said database.

22. (original) A document assembly system in accordance with Claim 21 wherein said database comprises at least one security system that limits access to said database to authorized users.

23. (original) A document assembly system in accordance with Claim 20 wherein said server is further configured to communicate with said processor module to restructure and reassemble a previously assembled document.

24. (original) A document assembly system in accordance with Claim 20 wherein said server is further configured to communicate with said processor module to restructure and reassemble a previously assembled document by performing at least one of changing parameters within the previously assembled document, and adding new data and insertable documents to the previously assembled document while reusing organizational parameters, insertable documents, and data common to the previously assembled document.

25. (original) A document assembly system in accordance with Claim 20 wherein said server is further configured to communicate with said processor module to assemble documents from at least one template stored in said database, each of said template configured to assure compliance with state and federal laws, rules, and regulations, and business entity rules, regulations, and policies.

26. (original) A document assembly system in accordance with Claim 20 wherein said server is further configured to communicate with said processor module to integrate pre-approved documents and files from another computer system into said assembled document.

27. (previously presented) A document assembly system in accordance with Claim 20 wherein said server is further configured to communicate with said processor module to display at least one of a report and summary including at least one of a user identity who created said document assembly data, a user identity who last modified said document assembly data, and the workflow status of said document assembly.

28. (original) A document assembly system in accordance with Claim 20 wherein said server is further configured to communicate with said processor module to display a report including at least one of a summary of all document assembly parameters, a summary of missing and incomplete data, and a summary of missing and corrupted document assembly elements.

29. (original) A document assembly system in accordance with Claim 20 wherein said server is further configured to communicate with said processor module to provide secure access to said server such that only authorized users can access said assembled

documents data, reports and summaries generated by said system relating to said assembled documents, data links provided within said system, and data stored in at least one database coupled to said server.

30. (original) A document assembly system in accordance with Claim 20 wherein said server is further configured to designate at least one question displayed on said remote system as mandatory such that a mandatory question is automatically assigned a response by said server that corresponds to a response entered by a user to a linked antecedent question.

31. (original) A document assembly system in accordance with Claim 20 wherein said server is further configured to generate and display the series of questions on said at least one remote computer based on a document assembly structure selected by the user.

32. (original) A document assembly system in accordance with Claim 31 wherein said server is further configured to prompt the user to assure that each question within the series of questions is properly responded to prior to data being communicated between said server and said at least one remote computer.

33.-47. (cancelled)

48. (previously presented) A document assembly system in accordance with Claim 1 wherein each document class is associated with a specific type of business transaction and comprises a plurality of document types, each document type represents specific contractual provisions typically associated with documenting the specific type of business transaction including alternative and optional contractual provisions selectable by the user based on the specific type of business transaction being documented.